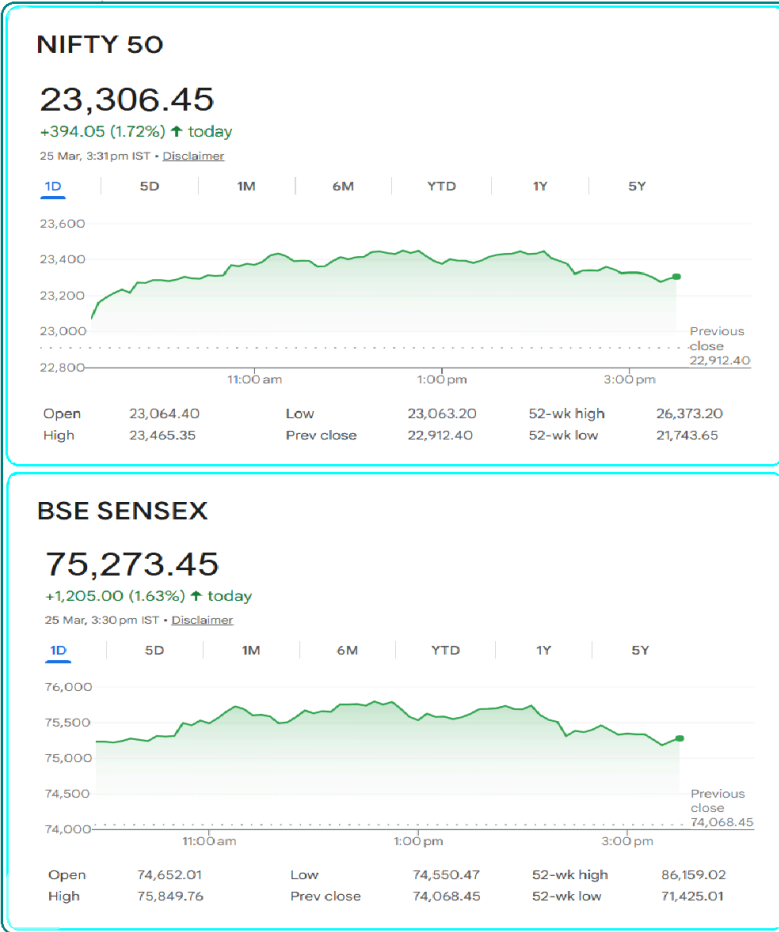


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23306.45	22912.40	1.72%
S&P BSE SENSEX	75273.45	74068.45	1.63%
NIFTY MID100	55331.05	54087.00	2.30%
NIFTY SML100	15896.55	15495.20	2.59%

(Source: [NSE](#), [BSE](#))

Market Wrap Up

- The key equity benchmarks ended with strong gains, extending their uptrend for the second consecutive session, supported by positive global cues following indications of possible de-escalation in Middle East tensions and a drop in crude oil prices below the \$100 per barrel mark. Despite the positive momentum, traders remained watchful amid uncertainty surrounding the reopening of the Strait of Hormuz. The Nifty closed above the 23,300 level.
- The S&P BSE Sensex zoomed 1,205 points or 1.63% to 75,273.45. The Nifty 50 index soared 394.05 points or 1.72% to 23,306.45. In the two consecutive trading sessions, Sensex and Nifty jumped 3.54% and 3.53%, respectively. The BSE 150 MidCap Index surged 2.34% and the BSE 250 SmallCap Index jumped 2.41%.
- Among the sectoral indices, the Nifty Consumer Durables index (up 3.51%), the Nifty Realty index (up 2.69%) and the Nifty PSU Bank index (up 2.67%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (up 0.08%), the Nifty Oil & Gas index (up 0.71%) and the Nifty Media index (up 1.13%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **April** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **36848** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **April** series has been witnessed in **TCS, TECHM, OIL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53708.10	52605.65	2.10%
NIFTY AUTO	25058.60	24515.25	2.22%
NIFTY FMCG	47283.35	46408.30	1.89%
NIFTY IT	29671.30	29648.90	0.08%
NIFTY METAL	11342.20	11059.15	2.56%
NIFTY PHARMA	22679.75	22239.80	1.98%
NIFTY REALTY	692.10	673.95	2.69%
BSE CG	67232.94	65886.72	2.04%
BSE CD	55091.24	53342.33	3.28%
BSE Oil & GAS	25796.43	25594.85	0.79%
BSE POWER	6898.06	6788.65	1.61%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	53749.62	52252.28	2.87%
HANG SENG	25335.95	25063.71	1.09%
STRAITS TIMES	4904.54	4862.43	0.87%
SHANGHAI	3931.84	3881.28	1.30%
KOSPI	5642.21	5553.92	1.59%
JAKARTA	7302.12	7106.84	2.75%
TAIWAN	33439.11	32612.24	2.54%
KLSE COMPOSITE	1716.68	1708.76	0.46%
ALL ORDINARIES	8745.30	8571.30	2.03%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	126314.43	128067.97
NSE F&O	471680.69	499266.16

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1805.37

(Source: [NSE](#))

Corporate News

- Larsen & Toubro's** Water & Effluent Treatment business vertical has secured a significant order from the Guwahati Metropolitan Drinking Water & Sewerage Board for a major water management project in Guwahati. The contract valued between Rs 1,000 crore and Rs 2,500 crore.
- Infosys** Finacle, part of EdgeVerve Systems, a wholly-owned subsidiary of Infosys, and Producers Savings Bank Corporation, a leading bank in the Philippines, today announced that the bank will modernize its technology landscape by upgrading to the latest version of the Finacle Core Banking Solution.
- Lupin** announced that it has received tentative approval from the U.S. Food and Drug Administration for its abbreviated new drug application (ANDA) for Pitolisant tablets, 4.45 mg and 17.8 mg.
- Kotak Mahindra Bank** said it is reconciling fixed deposits and accounts linked to the Municipal Corporation of Panchkula after reports of Rs. 150 crore missing funds surfaced. The bank said the exercise was initiated at the corporation's request and a large portion has already been matched. It added that account processes and transactions followed due norms and that it has filed a complaint with local police while cooperating with authorities.
- M3M India** has partnered with global hospitality brand ONE Atmosphere to operate 256 luxury serviced suites at its Gurugram project, Corner Walk. This marks ONE Atmosphere's debut in India, aiming to offer a differentiated serviced hospitality experience. The collaboration plans to expand across Gurugram and Noida initially, with future international expansion in mind.
- Maruti Suzuki** will invest Rs 10,189 crore for its fifth manufacturing facility in Gujarat. The first assembly line will have a capacity of 250,000 vehicles annually. This phase is expected to be commissioned by 2029. The investment will be funded through internal accruals. This expansion will increase the company's total production capacity.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	956.00	903.60	5.80%
ULTRACEMCO	11204.00	10764.00	4.09%
BAJFINANCE	882.75	849.00	3.98%
GRASIM	2647.80	2549.40	3.86%
ADANIANT	1886.60	1817.90	3.78%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TECHM	1408.50	1414.72	-0.44%
POWERGRID	295.00	297.96	-0.99%
TCS	2377.40	2397.29	-0.83%
BEL	413.45	416.84	-0.81%

(Source: [Moneycontrol](#))

- CEIGALL INDIA** has executed two long-term power purchase agreements (PPAs) through its wholly owned subsidiaries, Ceigall Green Energy MH1 & Ceigall Green Energy MH2, with Maharashtra State Electricity Distribution. The first project, with 190 MW across four districts, has an EPC cost of about Rs 772 crore, while the second, 147 MW project spanning two districts, carries an EPC cost of Rs 597 crore. The combined EPC value is approximately Rs 1,369 crore.
- PURAVANKARA** announced an ambitious expansion plan to launch 30 projects over the next 24 months, primarily across South India and Mumbai. The planned pipeline comprises around 51.14 million sq. ft. of developable area with an estimated gross development value (GDV) of over Rs 55,000 crore, marking a significant scale-up in the company's growth strategy.
- BRIGADE GROUP** has announced the launch of Brigade Belvedere, a 10.75-acre residential development situated on Budigere Main Road, off Old Madras Road in East Bengaluru. This initial phase of the development includes two of five planned towers, comprising 773 premium residential units. With an estimated revenue potential exceeding Rs 1,100 crore.
- AVIO SMART MARKET STACK (ASMS)**, formerly known as **BARTRONICS INDIA**, has entered into a strategic MOU with Aquasafra Holdings, Inc. (AHI) and Waterfield Farms, Inc. (WFI), USA, to explore the development of technology-driven aquaculture and fisheries ecosystems.
- ITCONS E-SOLUTIONS** announced that it has secured a manpower outsourcing services contract worth Rs 1.71 crore from the Directorate General of Defence Estates under the Ministry of Defence.
- AVANTEL** has secured a domestic order worth Rs 459.90 crore from Zetwerk Manufacturing Businesses for the supply of satellite communication equipment.
- NTPC Green Energy** signed a memorandum of understanding with Nxta Data to explore the development of renewable energy projects.
- Bharat Petroleum Corporation** said that the company, along with NeuEN Green Energy, has secured a long-term contract to supply 10 KTPA of green hydrogen to Numaligarh Refinery.
- Jindal Stainless** commissioning a 1.2 million tonnes per annum (MTPA) stainless steel melt shop (SMS) in Indonesia through its joint venture, ahead of schedule.
- Waaree Energies** approved an increase in its stake in subsidiary Waaree Transpower and a fresh capital expenditure plan. The acquisition will be carried out through a cash consideration of around Rs 190 crore at Rs 75 per share.
- Sterlite Technologies** launched Hollow Core Fibre (HCF) cable, to meet the low-latency and high-bandwidth requirements of modern Data Centres, Hyperscalers, and High-Frequency transmission networks.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- U.S. flash S&P Global Composite PMI slipped to 51.4 in March 2026 from 51.9 in February. The manufacturing PMI climbed to 52.4 in March 2026, up from 51.6 in February while the services PMI fell to 51.1 in March of 2026 from 51.7 in the previous month.
- U.K. annual inflation rate steadied at 3% in February 2026, the same as in January. The annual core inflation rate stood at 3.2% in February 2026, compared with January's reading of 3.1%. Compared to the previous month, the CPI rose 0.4%, recovering from a 0.5% fall in January. On a monthly basis, core consumer prices increased 0.6%, reversing a 0.6% decline in January.
- U.K. factory gate prices rose 1.7% year-on-year in February 2026, easing from a 2.5% increase in January. On a monthly basis, producer output prices fell 0.5%, after being unchanged in January.
- Germany's Ifo Business Climate Index dropped to 86.4 in March 2026, from February's revised 88.4. The business expectations plunged to 86.0 from 90.2 while the assessment of current conditions remained flat at 86.7.
- Australia's annual inflation edged down to 3.7% in February 2026. Monthly, the CPI was flat, reversing a 0.4% gain in January.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 87.81/bbl (IST 17:00).
- INR weakened to Rs. 93.98 from Rs. 93.88 against each US\$ resulting in daily change of 0.11%.
- S&P Global Ratings has boosted India's growth forecast for FY27 to 7.1%. Strong consumer spending and exports are driving this optimism. However, the ongoing Gulf conflict presents potential challenges. Higher oil prices could impact inflation and government finances. The Reserve Bank of India is expected to maintain current interest rates, but a rate hike is possible if inflation persists.
- Indian refiners are boosting Russian oil imports by 60 million barrels next month, a significant jump to counter Middle East supply disruptions. This move, facilitated by a US waiver, sees major players like Mangalore Refinery returning to Russian crude. The nation is also increasing Venezuelan oil purchases, as Russia enjoys renewed export profits.
- The Finance Bill has been passed by the Lok Sabha. This marks a key step for the Central Government's financial plans for 2026-2027. The bill brings legal backing to budget proposals. Changes in taxes and duties will affect individuals and businesses. The budget focuses on growth, jobs, and inclusive development. It emphasizes infrastructure, private investment, and skilling initiatives.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 26/03/2026

Aster DM Healthcare Limited	Dividend
Chennai Petroleum Corporation Limited	Dividend
Trent Limited	Fund Raising

Board Meetings as on 27/03/2026

Piramal Finance Limited	Fund Raising
Silgo Retail Limited	Fund Raising
Sundaram Clayton Limited	Dividend
Sundaram Finance Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 27/03/2026

Vedanta Limited	Interim Dividend - Rs 11 Per Share
Angel One Limited	Interim Dividend - Rs 1.75 Per Share
Hind Rectifiers Limited	Bonus 1:1
Housing & Urban Development Corporation Limited	Interim Dividend - Rs 1.25 Per Share
Samvardhana Motherson International Limited	Interim Dividend - Re 0.35 Per Share

(Source: NSE)

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